

Royal Canadian Air Farce The Practice ER Da Vinci's Inquest Charmed Baywatch Due South Will and Grace Family Law The Nature of Things
Becker That 70's Show Hockey Night In Canada Dawson's Creek Twenty One Cold Squad Ally McBeal Just Shoot Me Drop the Beat Dateline
NBC 20/20 This Hour Has 22 Minutes The West Wing Roswell The Fifth Estate The Pretender Who Wants to be a Millionaire Dooley Gardens
America's Most Wanted Spin City Outer Limits JAG Third Watch Wind At My Back NYPD Blue Little Men Double Exposure Two Guys and a Girl
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IT'S GOOD AND WE LIKE IT
QUALITY TELEVISION, MADE IN CANADA

October 2000

FRIENDS OF CANADIAN BROADCASTING

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This report was prepared for Friends of Canadian Broadcasting by a research and editorial team led by Arlan Gates, with input from Amanda McQuitty and guidance from members of Friends' Steering Committee. It primarily uses sources in the public domain. However, Friends subscribed to the 1999 CBC Research/Nielsen Media Research Canadian Media Quality Ratings Survey at the commercial subscription rate.

Friends is a Canada-wide voluntary organization supported by 48,000 households whose mission is to defend and enhance the quality and quantity of Canadian programming in the Canadian audio-visual system.

Visit Friends online at <http://friendscb.ca>

Friends of Canadian Broadcasting
131 Bloor Street West, Suite 200/238
Toronto, Ontario M5S 1R8
friends@friendscb.ca

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IT'S GOOD AND WE LIKE IT

QUALITY TELEVISION, MADE IN CANADA

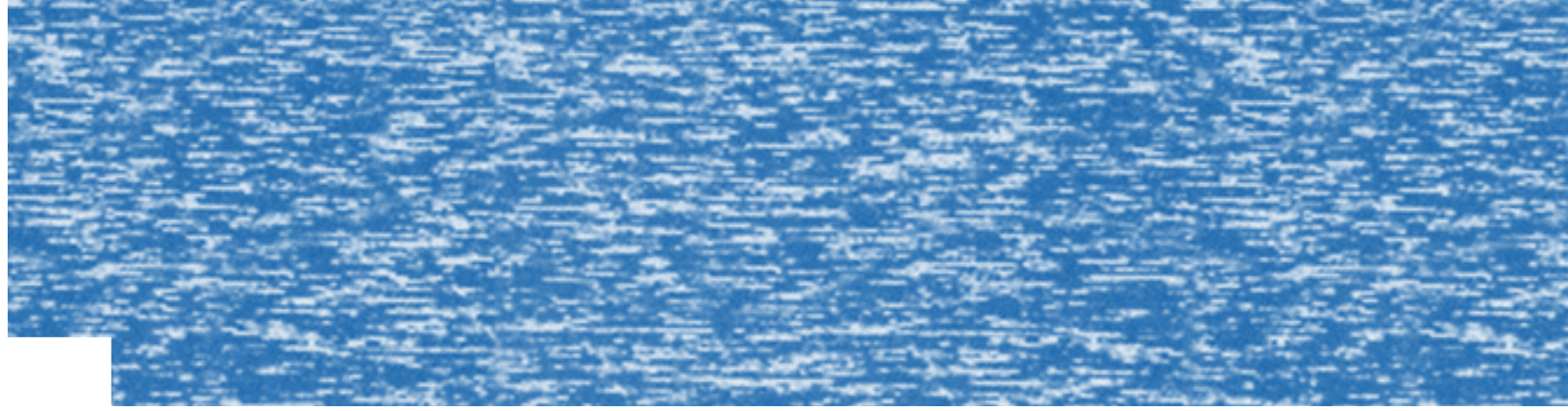


Canadian television has come a long way. Friends of Canadian Broadcasting will soon be releasing a first annual Report on the State of English-Language Television in Canada. In advance of this year's 15th Annual Gemini Awards, Friends is releasing the following series of snapshots from our research, focusing on measurements of quality. The data come mainly from three sources:

- ▶ Gemini Awards from the past decade;
- ▶ the Canadian Media Quality Ratings Survey, and
- ▶ Nielsen Media Research audience data.

It's Good And We Like It finds that at the start of the 21st century, Canadians are watching and enjoying high-quality Canadian programming, challenging the conventional wisdom that Canadians prefer American programs.

October 2000



1. THE INDUSTRY SPEAKS

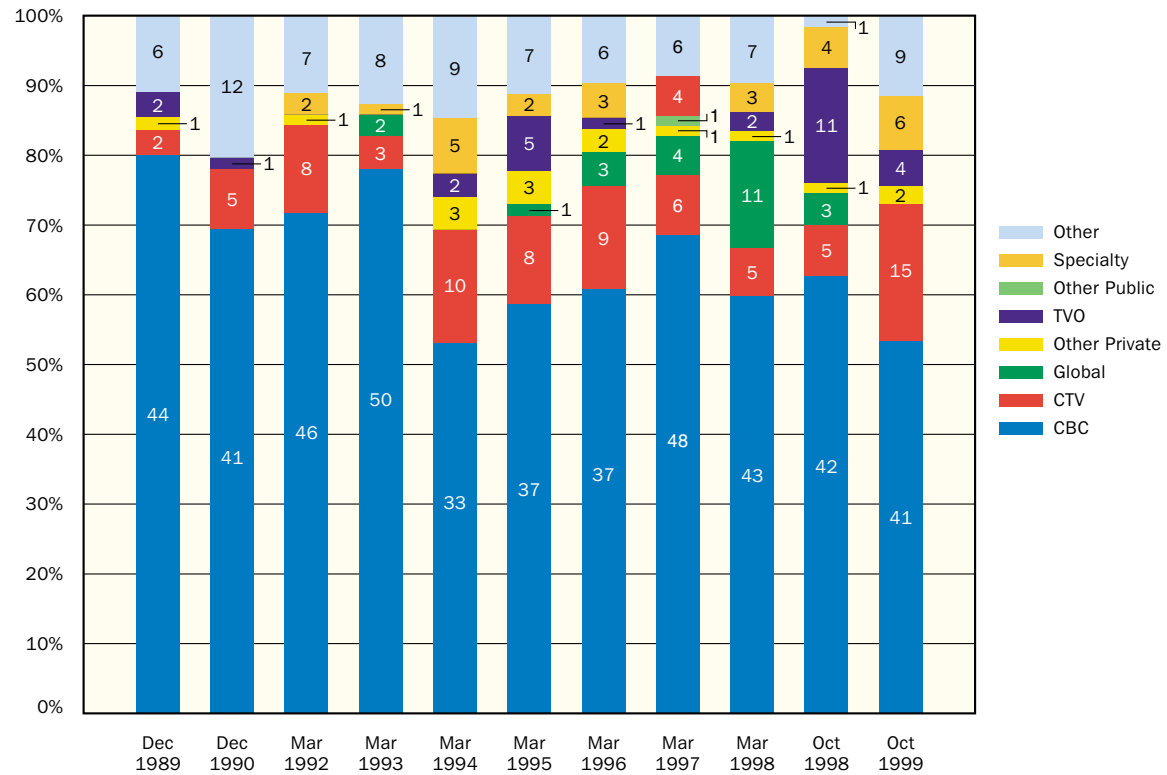
Each year, the Academy of Canadian Cinema and Television organizes the Gemini Awards to recognize achievement in Canadian television. A jury of industry peers screens a host of Canadian programming, identifying five nominations in each competitive category, from which a winner is ultimately chosen by ballot. In this way, the Academy and the Gemini Awards provide a continuous and invaluable measure of what's best, and what is quality, in English Canadian TV.

The following charts summarize the winners by broadcaster over the last decade, the first chart covering all awards; the second, awards presented during the annual gala broadcast that airs live nationwide on the CBC each year; and the third, nominees.





Who broadcast the Gemini Award Winners. All categories, 1989–1999



Sources: Academy of Canadian Cinema & Television online public database, other public domain sources, FCB archives. Gemini Awards reflect programming aired in the previous full television season. Awards are charted in percentage format, but figures represent actual number of awards. The number of awards and the specific awards given varied from year to year. "Other" includes productions not aired on broadcast television in Canada, unidentified programming, and awards not tied to specific productions. CBC includes the specialty channel Newsworld. "Other private" includes CHUM, which includes the specialty channel Bravo!

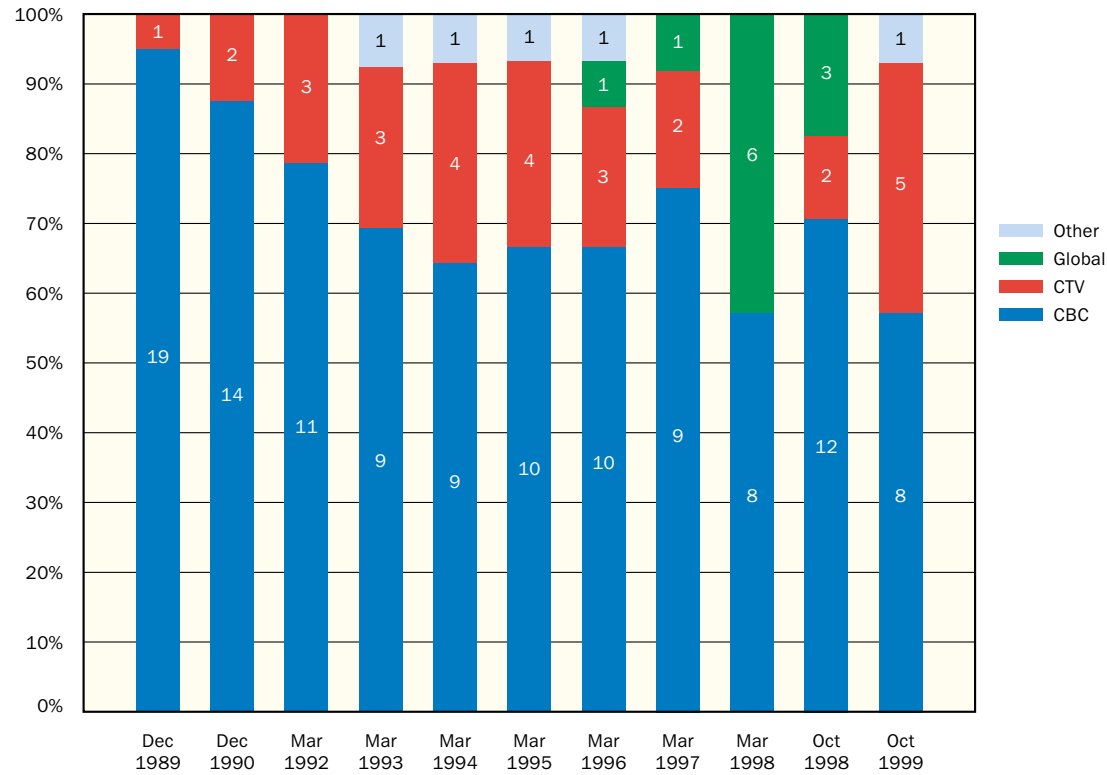


Ten years ago CBC productions garnered more than 90 percent of all Gemini Awards. While the CBC still aired a majority of the 1999 Award winners, a downward trend has been clear throughout the decade. The shift in public funding away from the CBC in favour of the private broadcasters, and cable specialty channels, has translated into more award-winning shows in their program schedules. It may also be said that with a firm nudge from the CRTC, private broadcasters have shown more determination to invest in quality Canadian programs.

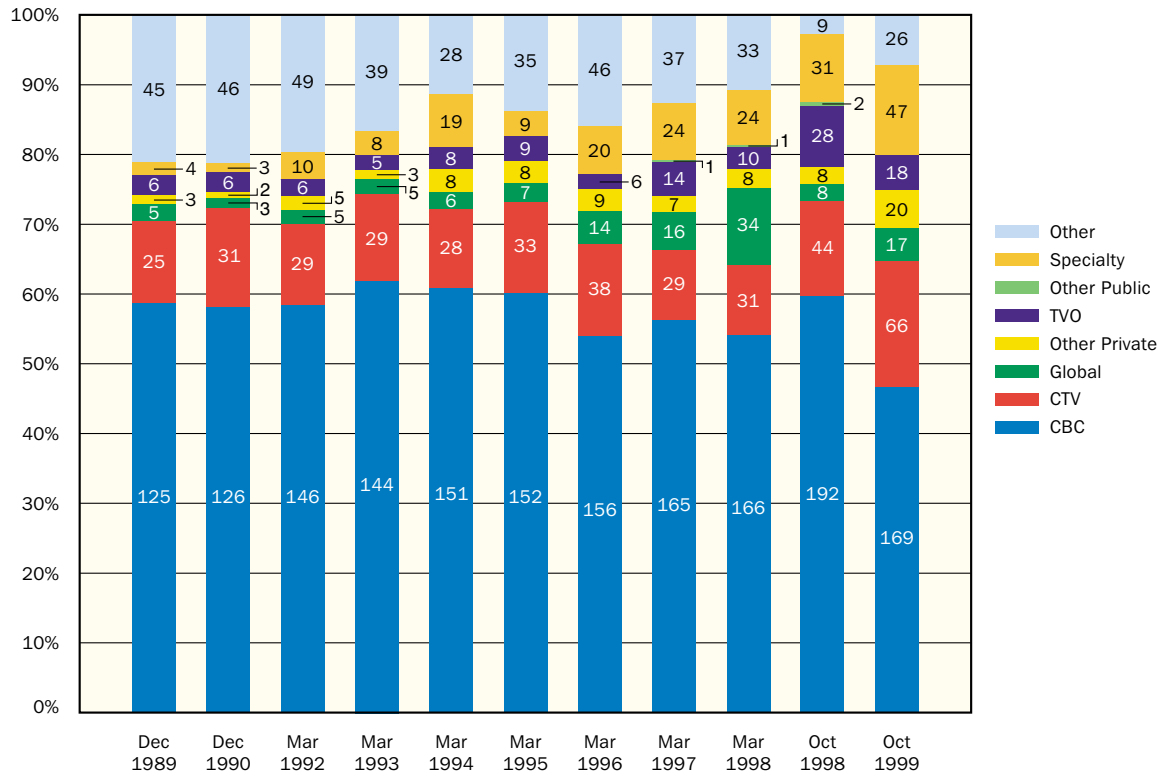
The Gemini Awards data reveal a gradual trend away from complete domination by the CBC towards a more diverse system, where CTV, and recently other broadcasters, are airing some of the best Canadian programs. An analysis of recent nominees (p.7) underlines that CBC continues to hold a strong lead over the combined private sector.



Who Broadcast the Gemini Award Winners. Televised Awards Ceremony Only, 1989–1999



Sources: Academy of Canadian Cinema & Television online public database, other public domain sources, FCB archives. Gemini Awards reflect programming aired in the previous full television season. Awards are charted in percentage format, but figures represent actual number of awards. The number of awards and the specific awards given varied from year to year. "Other" may include other private broadcasters, other public broadcasters, specialty channels, productions not aired on broadcast television in Canada, unidentified programming, or awards not tied to specific productions.



Who Broadcast the Gemini Award Nominees. All Categories, 1989–1999

Sources: Academy of Canadian Cinema & Television online public database, other public domain sources, FCB archives. Gemini Awards reflect programming aired in the previous full television season. Awards are charted in percentage format, but figures represent actual number of awards. The number of awards and the specific awards given varied from year to year. "Other" includes productions not aired on broadcast television in Canada, unidentified programming, and awards not tied to specific productions. "Other private" includes CHUM, which includes the specialty channel Bravo!

October 2000

2

2. What Viewers Think

This study follows in part from an earlier report on English Canadian TV networks conducted by Friends of Canadian Broadcasting in 1991, entitled *Networking*. That study identified two key ways to measure audience appreciation of Canadian TV: how many Canadians watch a particular program in a given time period, and what they think about that programming.

It's Good And We Like It has drawn heavily from the Canadian Media Quality Ratings Survey (QRS), a syndicated Canadian TV, radio and Internet audience survey conducted on behalf of Nielsen Media Research and CBC's research department by Canadian Facts.

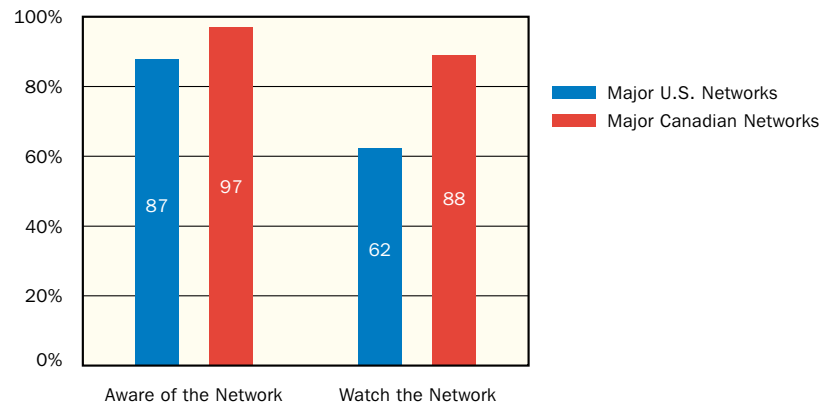
Based on in-home interviews with a broad random sample of households, the survey employs a methodology independently appraised by the Canadian Advertising Research Foundation.¹

1. The in-home interview technique provides a high quality of survey data and allows creative approaches to be applied both to survey technique and to sampling. For instance, respondents can be shown materials during the interview that could not be used in a mail-in or telephone survey, such as daily and multi-day program schedules for an extensive list of programs. Both households and individuals to be interviewed are randomly selected, and up to five attempts are made to secure a personal interview with a selected respondent. In addition to the in-person interview, respondents complete a self-administered written survey.





Awareness and Viewing of English-language Conventional TV Networks, 1999



Source: 1999 QRS CBC/Nielsen Media Research. In this chart, major Canadian networks included CBC, CTV, and Global (Ontario only); major U.S. networks included CBS, ABC, NBC, FOX, and PBS. Certain smaller networks were excluded.



The 1999 QRS² – gathered from 2,160 English-speaking adults by Canadian Facts in October/November 1999 – found clear evidence that Canadians were more aware of their own TV “networks”,³ as opposed to rival U.S. networks.

The 1999 QRS also found that Canadians were more likely to watch Canadian networks than U.S. networks. Of course, much of what was available on private Canadian networks was U.S. network drama series or sitcoms, especially in prime time.⁴ Even so, the fact that so many more Canadians chose to watch those shows on Canadian networks points to the overwhelming influence that CBC, CTV and Global have on the television programming Canadians watch.

2. Some of these data were used as the basis for the conclusions reached by the Auditor General of Canada in his recent five-year Special Examination Report on CBC, published June 29, 2000.

3. In this report, “networks” refers to the commonly understood sense of the term: a group of stations with common ownership and some common programming. The legal definition of network in the Broadcasting Act is narrower. Thus Global, while not a network in the legal sense, is commonly thought of as a network, and is considered so in this report. The 1999 QRS measured Global in Ontario only. “Conventional” means broadcast “over-the-air”, not only on cable. “Major” refers to the largest station groups of roughly comparable size and national presence.

4. Over a survey period of three weeks in March 1999, Friends found that Canadian private broadcasters aired 34 non-Canadian half-hour drama shows compared with just 6 Canadian ones; and 39 non-Canadian hour-long drama series compared with just 11 of Canadian origin.

Viewer Satisfaction with Canadian Networks, 1999



Source: 1999 QRS CBC/Nielsen Media Research

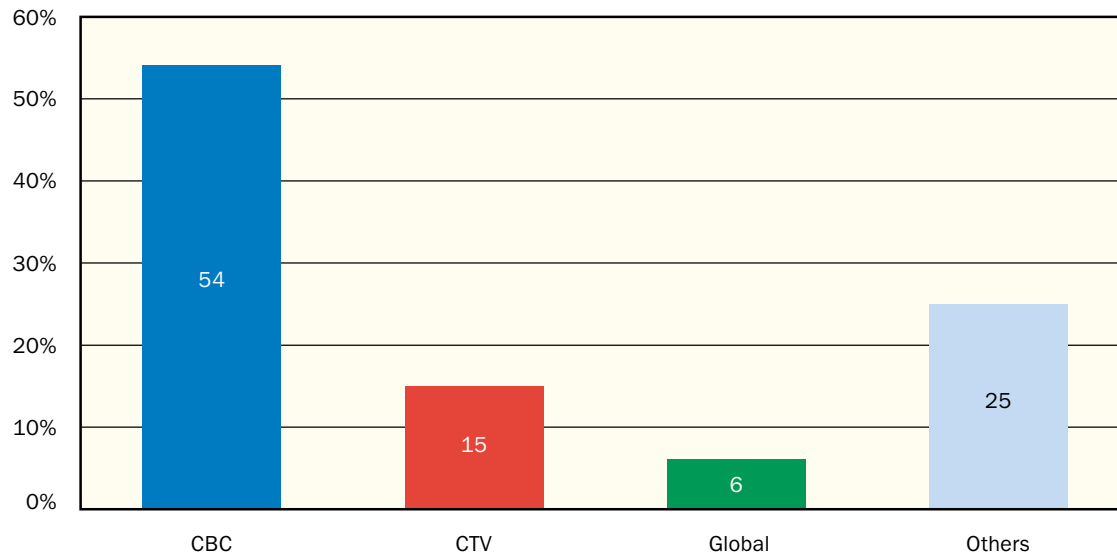


The 1999 QRS report gave Global the highest viewer satisfaction rating, slightly ahead of CTV, underscoring the popularity of American fare on private networks in Canada.⁵ CBC viewer satisfaction, though high, was the lowest of Canada's three national networks. The variation in satisfaction rates most likely reflects that Canadian broadcasters have different strategies for attracting audiences, and may well attract different communities of viewers. Global's "appointment television" strategy, for instance, may explain why it has the highest percentage of "very satisfied" viewers.

5. Viewers were asked if they personally were 'very satisfied', 'satisfied', 'dissatisfied' or 'very dissatisfied' with the programming carried on the network. In the 1999 QRS, viewers of a channel were considered to be those who reported any viewing of the channel, including those who said they watch the channel less than once per month.



Who Aired the Best Canadian Programs, 1999



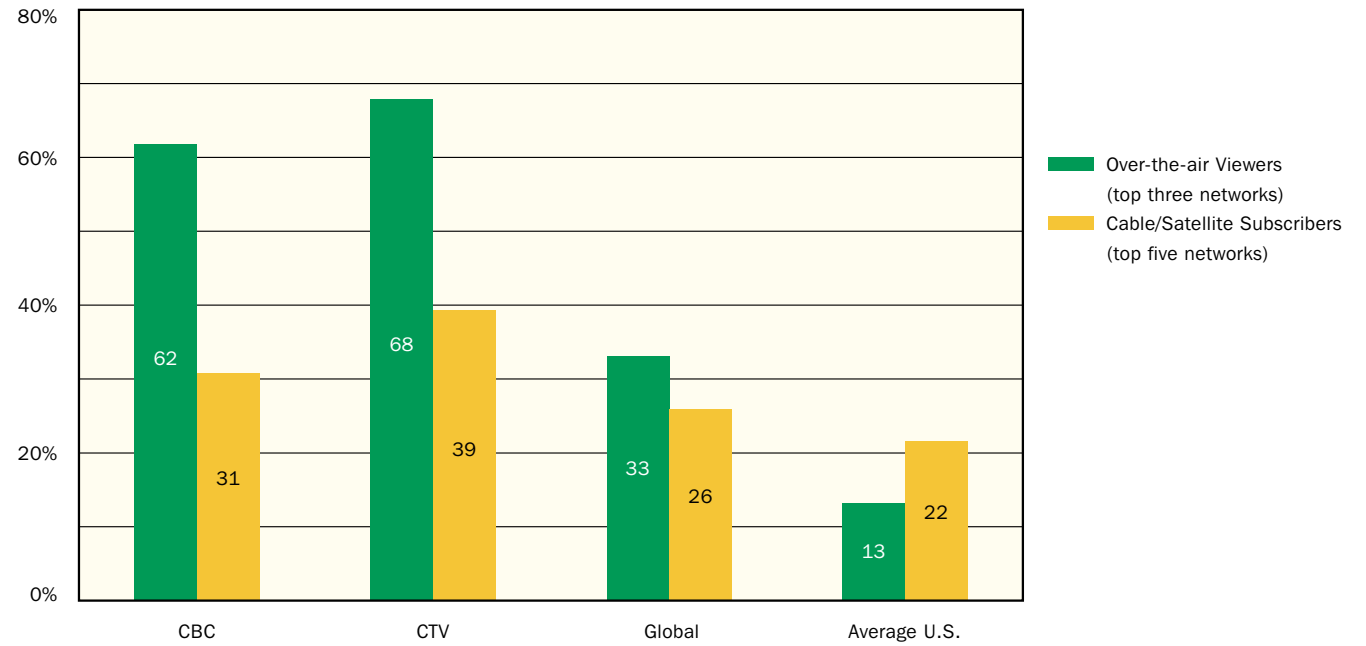
Source: 1999 QRS CBC/Nielsen Media Research. CBC includes Newsworld; CTV includes NewsNet. Based on cable/satellite subscribers who indicated that they watched Canadian programming.



A majority of respondents, however, believed that CBC aired the best Canadian programs. More than three times as many respondents chose CBC as chose CTV, and just six percent of respondents indicated that Global carried the best Canadian programs.



Desert Island TV: Networks Canadian viewers would not want to be without.



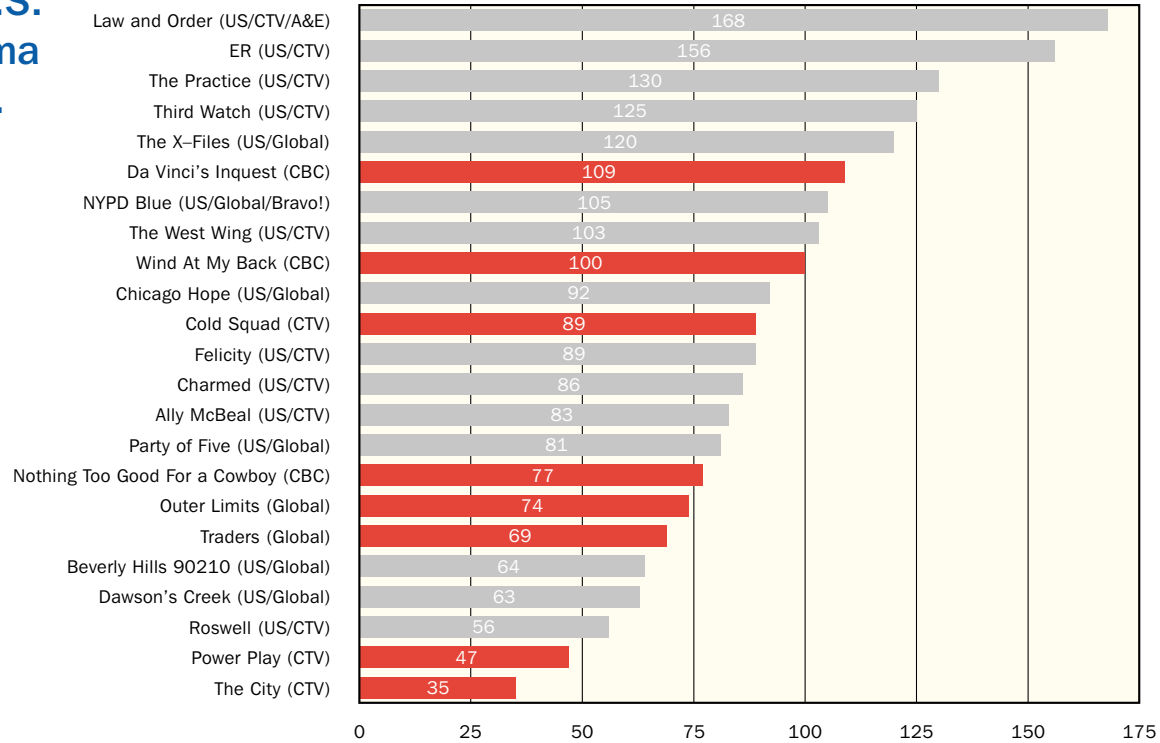
Source: 1999 QRS CBC/Nielsen Media Research



The 1999 QRS also measured what Friends has termed “desert island” TV: the top channels (including both networks and specialty services) that the viewer would want to access if only a limited number were available. Asked which TV channels they would keep if they could only keep a few, QRS respondents ranked Canadian networks far higher than rival U.S. channels. The same pattern is shown among both over-the-air viewers (who were asked to choose the top three channels) and cable/satellite subscribers (who were asked to choose the top five channels). Both groups were most likely to choose CTV, followed by CBC and Global, with U.S. networks far behind. Of course, cable/satellite subscribers have many more channels to choose from. Yet A&E, a U.S. channel, was the only specialty channel to fare better than any major Canadian network – cable subscribers ranked it ahead of CBC, but behind CTV.



How Major Canadian and U.S. Prime Time Drama Series Compare. Quality Ratings, 1999



Source: 1999 QRS CBC/Nielsen Media Research, FCB archives. This chart excludes 30-minute dramas. "U.S." means a U.S. series that is available on the Canadian network listed above, and which may be simulcast.



The 1999 QRS also rated 92 individual Canadian and U.S. programs based on how viewers responded to questions about program quality and whether they enjoyed particular programs.⁶

The 1999 QRS ratings point to Canadian drama series holding their own against U.S. fare. For example, *DaVinci's Inquest*, the top Canadian program surveyed, performed better than popular and critically-praised U.S. series like *NYPD Blue* and *The West Wing*.⁷ The proximity of Canada to the U.S. border, and the extensive marketing that CTV and Global give to the numerous U.S. series in their schedules explains in part the continuing popularity of U.S. programming on Canadian TV.

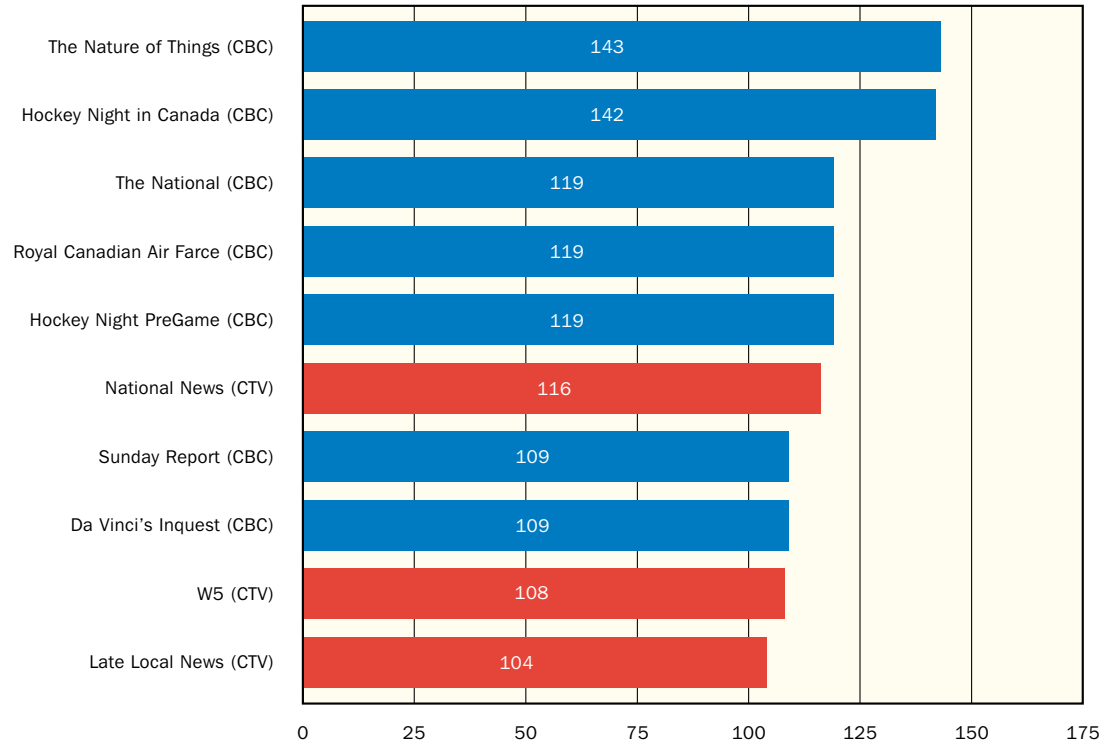
At the same time, the QRS underscores that homegrown drama strikes a chord with Canadians as it fights for viewers in an increasingly competitive broadcast landscape. Considering the substantial multiples of production funding the U.S. series enjoy over their Canadian counterparts, this result constitutes a distinct achievement for the Canadian production system.

6. Respondents were asked whether they were aware of a program, whether they had watched that program, and if so whether they considered it 'very good', 'good', 'neither good nor poor', 'poor' or 'very poor'. The percentage of respondents who rated a program 'very good' was converted to the numerical quality rating shown in the chart. Programs that were given a rating other than 'very good' do not contribute to the rating.

7. The QRS data also indicate a sharp difference in Canadian viewers' evaluation of the quality of the Canadian drama, with *Da Vinci's Inquest* and *Wind At My Back* leading, and *Traders* and *Power Play* scoring among the lowest. These and most of the other series surveyed for the 1999 QRS, with the exception of *Outer Limits*, were in some way "identifiably" Canadian.



Top 10 Canadian Programs by Quality Rating. Major Networks, 1999



Source: 1999 QRS CBC/Nielsen Media Research, FCB archives. Excludes programs that aired on specialty channels and TVO.



Given the high cost and long development curve for Canadian drama productions, it should come as no surprise that most of the top Canadian programs in the 1999 QRS were in genres other than drama: news and current affairs, sports and comedy. In fact, the appearance of a Canadian drama among the top ten shows indicates a breakthrough in viewer perceptions of quality.

October 2000

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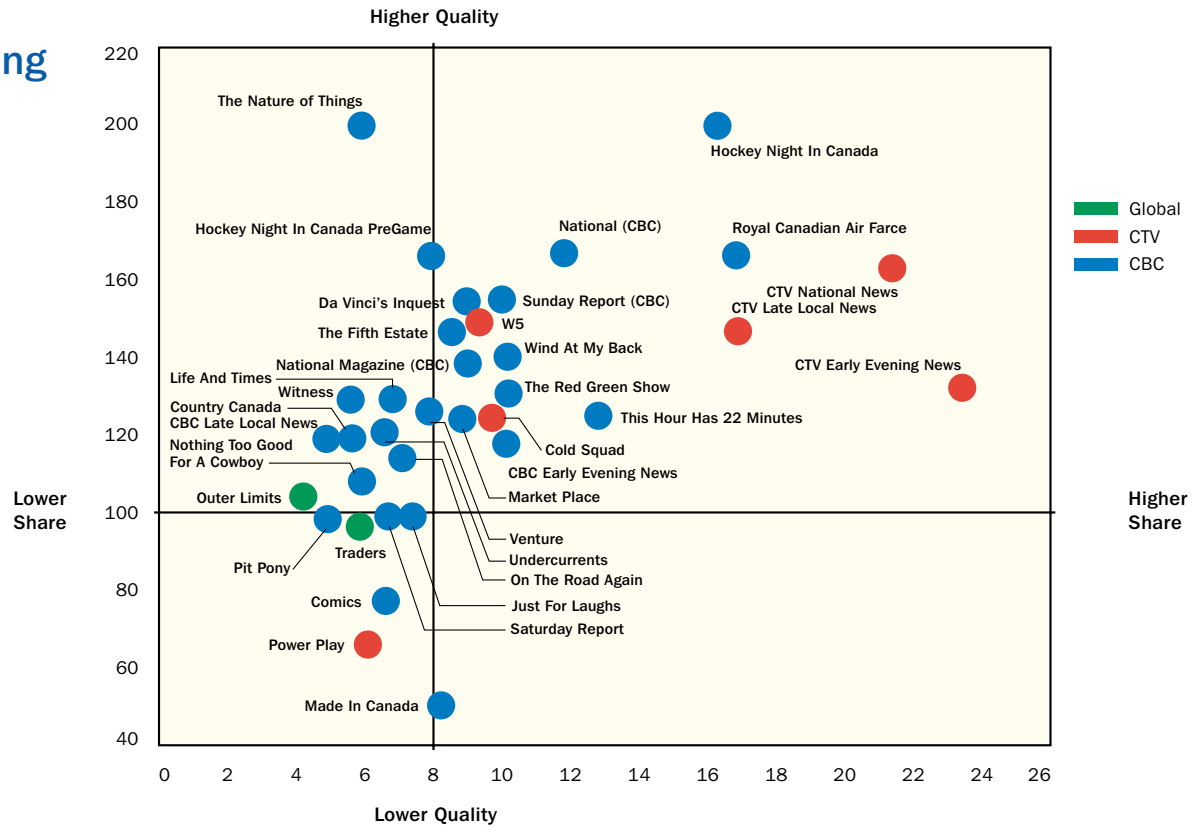
3. Do Audience Ratings Reflect Quality?

While there are some exceptions, a combination of 1999 QRS and audience data challenges the notion that programs that rate highly in quality attract less mass audience. In the following Canadian programming performance map, the majority of programs are in the top right quadrant, showing a correlation of higher quality and strong audience, while only one program appears in the lower right quadrant, attracting a lower quality rating despite a higher audience share. At the same time, the programs in the top left quadrant do support the theory that at least some high quality shows attract a disproportionately low audience share.

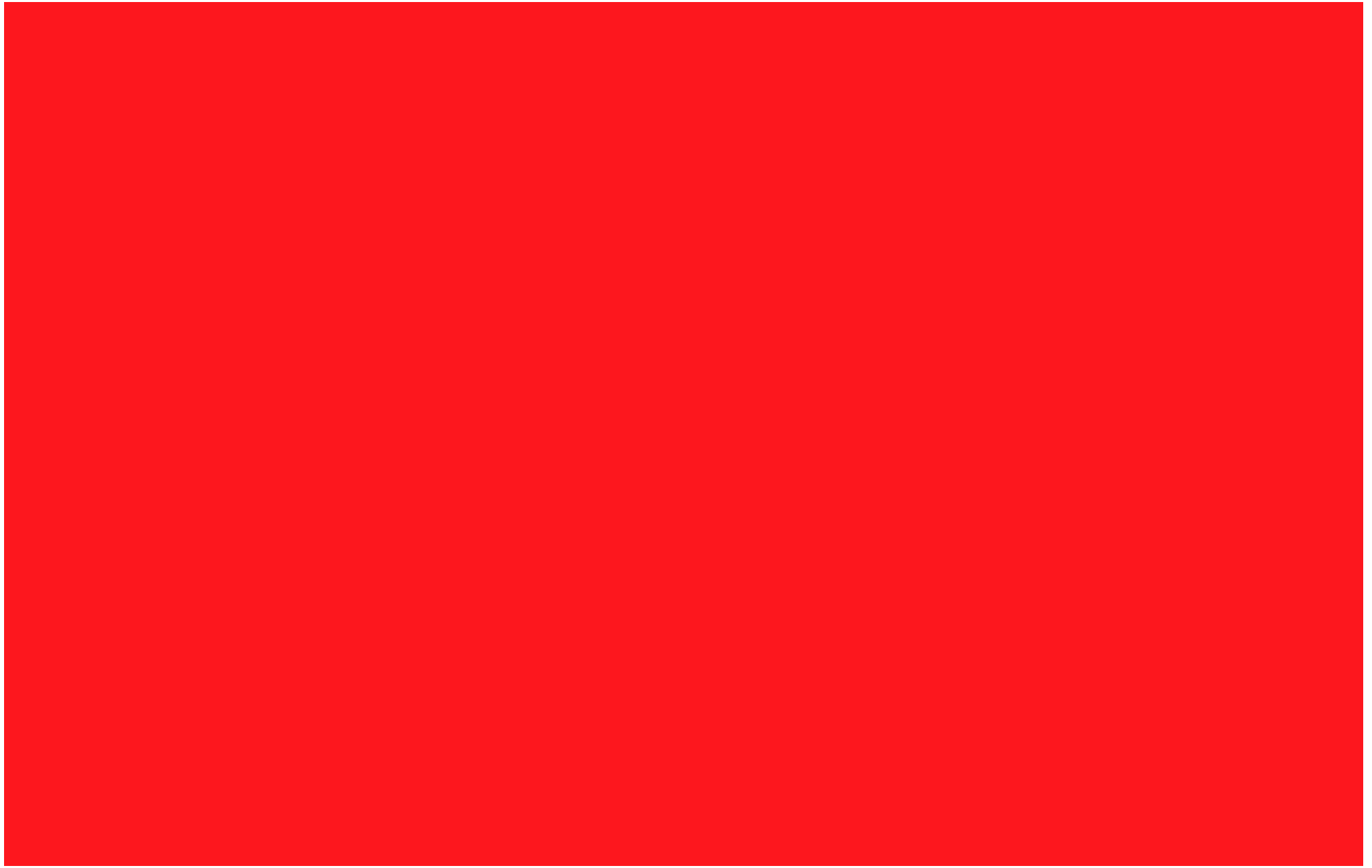




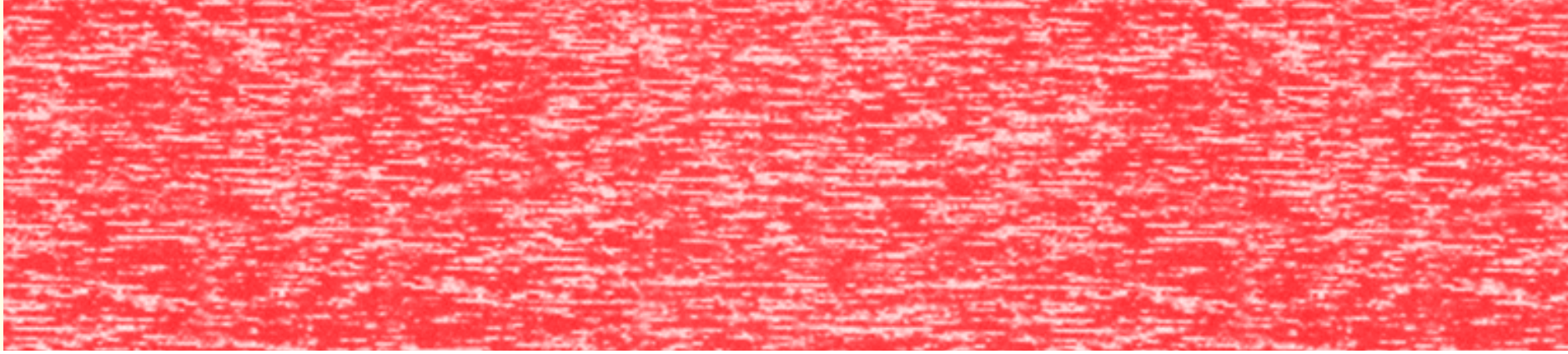
Prime Time Canadian Programming Performance Map. Audience vs. Quality Rating, 1999



Sources: 1999 QRS CBC/Nielsen Media Research (quality); Nielsen Media Research (audience shares)
 Audience data were unavailable for *The City*, which is excluded from this chart.



October 2000



Conclusion

The key finding of *It's Good And We Like It* is that Canadians continue to value high quality domestic programming, and they continue to watch it in large numbers. For years, Canadian news, sports and comedy shows have enjoyed strong ratings. Friends' 1991 *Networking* study highlighted the popularity of Canadian news and current affairs programs. What is new is the breakthrough of Canadian drama – both in popularity and in viewer perceptions of quality. The very high marks earned by shows like *Da Vinci's Inquest*, *Wind at My Back* and *Cold Squad* are proof positive that Canadians watch and appreciate Canadian drama, and Canadian television in general.

Although the CBC's financial resources have been deeply cut, the public broadcaster continues to produce the majority of award-winning and high quality Canadian programs. Public funds now being redirected to private broadcasters and specialty cable channels correlate with an increase in the number of high quality productions they broadcast.





In light of the flood of new competition, and much lower budgets for Canadian program production compared with the U.S., these findings constitute a strong vote of confidence for Canadian television. This is a tribute to government and CRTC policies which have encouraged the strengthening of Canadian choices in the audio-visual system, as well as to the entrepreneurial skills of Canadian creators, who have achieved these results in direct competition with the most powerful production industry on the planet



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